

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

CHAPTER 1: MARKETING PLANNING

⇒ Strategic Marketing Planning	1
⇒ Target Market	3
⇒ Mass Marketing and Targeted Advertising	3
⇒ Reach and Frequency	4
⇒ Designing Effective Ads and Copy	4
⇒ Trade Names	4
⇒ Bootstrap Marketing	5
⇒ Test Marketing	5
⇒ Market Research	6
⇒ Marketing Evaluation	6
⇒ Advertising Residual Effects	7
⇒ Tax Service SWOT Analysis - Example	8
⇒ Tax Service Marketing Plan Outline - Example	10
⇒ Monthly Marketing Plan – Example	12

CHAPTER 2: CLIENTS

⇒ Client Service	1
⇒ Convenience (Appointments, Walk-ins, Drop-offs, Off-site)	1
⇒ Client Communication	2
⇒ Prior Client Letters & Postcards	2
⇒ VIP Gold Card	3
⇒ Client Brochures	3
⇒ Client Newsletter	4
⇒ Sample Client E-Newsletter	6
⇒ Sample Client Printed Newsletter	10
⇒ Client Presentation Folders	12
⇒ Telemarketing	12
⇒ Telephone Answering	12
⇒ Price Inquires	13
⇒ Business Cards	14
⇒ Client Referral Programs	15
⇒ New Client Gift Cards	15
⇒ Client Presentation Folders - Example	16
⇒ Business Card – Example	18
⇒ New Client Referral Certificate – Example	19
⇒ Thank You Letter – Referral Program	20
⇒ Prior Client Calling Sheet - Blank form	21
⇒ Greeting Cards	22
⇒ Promotional Gifts	22
⇒ Client Surveys	22
⇒ Net Promoter Score	22
⇒ On-Hold Marketing Script - Example	23
⇒ Early Bird Special Postcard – Example	25

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

⇒ Non-returning Client Postcard – Examples	26
⇒ Client Survey Questionnaire - Example	27
⇒ We've Moved Postcard - Example	28
⇒ We've Moved Client Letter – Example	30
⇒ VIP Gold Card - Examples	31
⇒ Gift Card – Example	33
⇒ Prior Client Reintroductory Offer – Example	34
⇒ Peoples' Brochure - Example	
⇒ The Income Tax School Brochure - Example	

CHAPTER 3: MASS MEDIA ADVERTISING

⇒ Network Television	1
⇒ Television Script - Examples	3
⇒ Radio	4
⇒ Media Buying	4
⇒ The Seven Deadly Sins of Advertising	8
⇒ Radio Scripts - Examples	10
⇒ Newspaper	20
⇒ Mass Mailing	20
⇒ Directory Advertising	20
⇒ Flyer Mailings	21
⇒ USPS Direct Mail	21
⇒ Outdoor Advertising	21
⇒ Mass-Transit Advertising	22
⇒ Internet Advertising	23
⇒ Pay-Per-Click	24
⇒ Social Media	24
⇒ Why Have a Website	25
⇒ Search Engine Optimization	26
⇒ Why Your Firm Should Have a Blog	28
⇒ E-Business Trends for Tax Professionals	30
⇒ Post-It Note Ad - Example	41
⇒ USPS Every Day Direct Mail – Example	42
⇒ Flyer Mailing – Example	43
⇒ Billboard Signage – Example	44
⇒ Tax Preparer Flyer – Example	45
⇒ Peoples Tax Social Media Guide	
⇒ Social Media Tracking Spreadsheet – Example	

CHAPTER 4: TARGETED ADVERTISING

⇒ Segmenting Your Clients	1
⇒ Direct Mail	2
⇒ Letters	2
⇒ Coupon Pack/Magazine Mailings	3

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

⇒ New Homeowner Letter - Example	4
⇒ Newlywed Letter- Example	5
⇒ Postcards	6
⇒ Graduate Gift Certificates	6
⇒ Tax Preparers	6
⇒ Cable TV	6
⇒ Radio	7
⇒ Newspaper	7
⇒ Magazines & Newsletters	10
⇒ Cinema Advertising	11
⇒ Telemarketing	11
⇒ 800 Numbers	11
⇒ Internet Marketing	11
⇒ Direct Mail Postcard – Example	13
⇒ New Homeowner Postcard - Examples	14
⇒ Newly Married Flyer - Example	17
⇒ Monthly Publication Ad – Examples	18
⇒ Weekly Newspaper Ad – Example	20
⇒ Fast Refund Postcard - Example	21
⇒ Branding Advertisement – Example	22

CHAPTER 5: OTHER ADVERTISING

⇒ Grand Opening Events	1
⇒ Promotional Gifts	2
⇒ Open House Event	2
⇒ Open House Email Invitation - Examples	4
⇒ Open House Postcard Invitation – Example	6
⇒ Open House Pictures	7
⇒ Trade Show Exhibits	8
⇒ Tax Seminars	9
⇒ Business Cards	10
⇒ Coupons	11
⇒ Employee Group Tax Plans	12
⇒ Credit Union & Other Group Tax Plans	13
⇒ Other Group Tax Plan	13
⇒ Associate Referral Coupons	13
⇒ Associate Referral Coupon - Example	14
⇒ Associate Referral Letter - Example	15
⇒ Graduate Gift Certificates	16
⇒ Guarantee	16
⇒ Gift Certificate - Examples	18
⇒ Peoples' Tent Card - Example	21
⇒ Grand Opening Newspaper Ad - Example	22
⇒ Grand Opening Invitation - Example	23

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

⇒ Peoples' Grand Opening Photos	25
⇒ Grand Opening Flyers – Example	26
⇒ Trade Show Displays - Example	27
⇒ Tax Issues for Women Flyer - Example	29
⇒ Business Card - Examples	30
⇒ Group Tax Brochure - Example	31
⇒ Credit Union Discount - Example	33
⇒ Merchant Discount - Example	34
⇒ Anniversary Promotion - Example	35

CHAPTER 6: PUBLIC RELATIONS

⇒ Your Public Image	1
⇒ Publicity	1
⇒ Press Releases	1
⇒ Media Contacts	1
⇒ Press Releases - Examples	3
⇒ Obtaining Media Coverage	11
⇒ Becoming an Author	11
⇒ Reprints of Articles	12
⇒ White Papers	12
⇒ Public Speaking	12
⇒ Business Cards & Stationary	13
⇒ Employee Sales Training & Tools	13
⇒ Handling Income Telephone Calls	14
⇒ Free Public Services	14
⇒ Senior Citizen Accommodations	14
⇒ Volunteer Community Service	15
⇒ Trade Association Activity	15
⇒ Networking	16
⇒ Referrals (Suppliers, Friends & Professionals)	17
⇒ Hosting an Open House	17
⇒ Memberships	17
⇒ The Top Ten Causes of Taxpayer Pain – Whitepaper Example	19
⇒ Networking Contact Letters - Examples	23
⇒ Open House Invitation - Example	25

CHAPTER 7: TAX OFFICE SIGNAGE

⇒ Exterior Signs	1
⇒ Window Signs	2
⇒ Store Front Banners	2
⇒ Interior Signs & Displays	3
⇒ Mass-Transit Signage	4
⇒ Directional Signs & Billboards	4
⇒ Examples of Signage & Offices	5

**TAX PRACTICE MARKETING HANDBOOK
TABLE OF CONTENTS**

CHAPTER 8: PRICING

⇒ The Market	1
⇒ The Competition	1
⇒ Competitor's Sign - Example	2
⇒ Pricing Philosophy	3
⇒ Client Screening	4
⇒ Price Inquiries	4
⇒ Payments and Gift Certificates to Clients/Fee Refund Policies	4
⇒ Standard Schedules of Charges	5
⇒ Telephone Phone Price Estimates & Pricing Worksheets	5
⇒ Practicing Pricing Returns	5
⇒ Computer Pricing	5

CHAPTER 9: MARKETING SERVICES

⇒ Advertising Agencies	1
⇒ Graphic Arts	1
⇒ Copywriting	2
⇒ Photography	2
⇒ Public Relations	3
⇒ Media Buying	3
⇒ TV & Radio Commercial Production	3
⇒ Reproduction	4
⇒ Printing	5

CHAPTER 10: REFERENCES

⇒ Marketing Tools and Resources	1
⇒ Marketing Information	4
⇒ Sales Leads & Mailing Lists	5
⇒ Glossary of Marketing Terms	6
⇒ Bonus Material:	16
Top 3 Strategies for Successful Tax Business Marketing	
4 Game-changer Internet Marketing Lessons I Learned	
How to use LinkedIn as a Tax Professional	
Social Media Tips for Tax Preparers	
7 Ways to Gain Visibility Over the Holiday Season	